HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Saskatchewan

CANADA MORTGAGE AND HOUSING CORPORATION

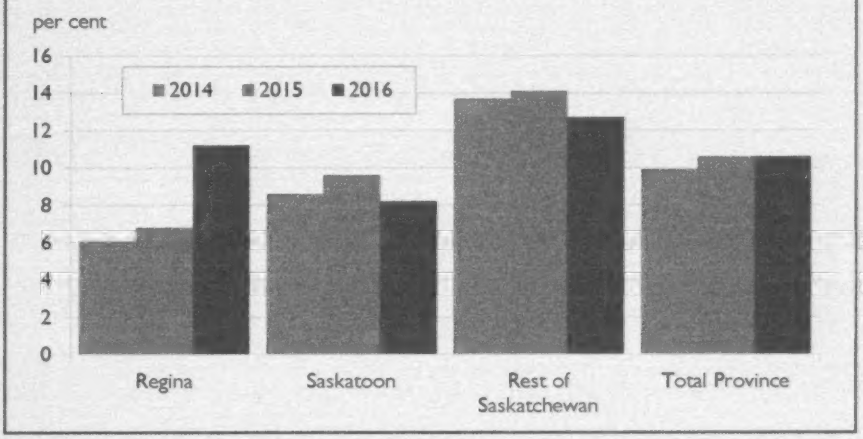
Date Released: 2016

Highlights

- The vacancy rate for standard spaces[1] in seniors' housing residences in Saskatchewan was 10.6 per cent in 2016, unchanged from 2015.
- Saskatoon and Regina reported standard unit vacancy rates of 8.2 per cent and 11.2 per cent, respectively. The vacancy rate in the rest of the province was 12.7 per cent.
- In 2016, the average rent for all standard spaces in Saskatchewan was $2,768, up from $2,667 in 2015.
- The 2016 survey identified 177 seniors' residences in the province containing a total of 6,900 standard and non-standard spaces, and housing 6,751 residents.

Figure 1

Provincial Vacancy Rate for Standard Spaces Remains Unchanged



Source: CMHC

[1] A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

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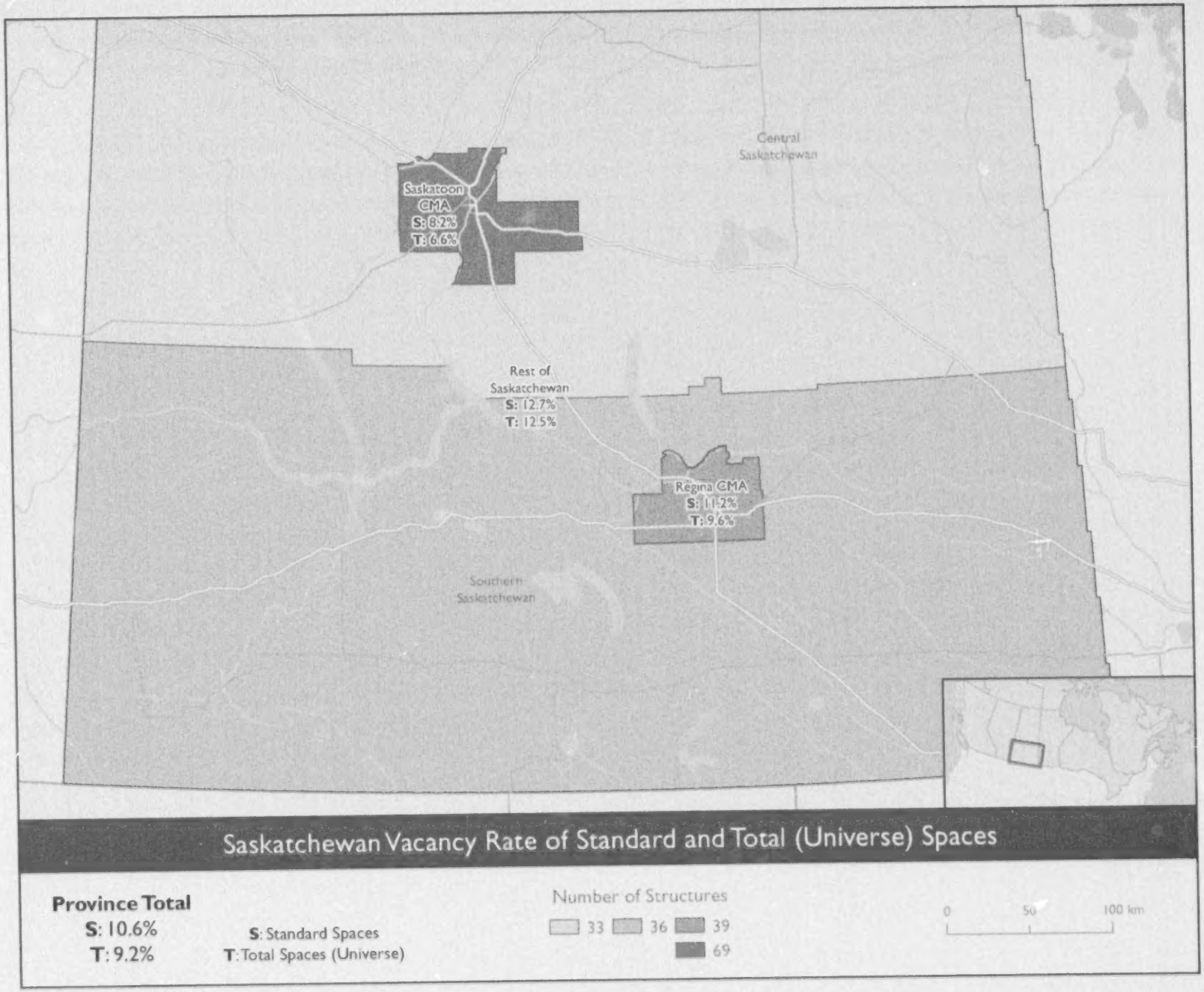


Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces

Vacancy Rates

Overall vacancy rate for standard care units remains unchanged

According to Canada Mortgage and Housing Corporation's (CMHC) 2016 Seniors' Housing Survey, the average vacancy rate for a standard retirement space in Saskatchewan was 10.6 per cent in 2015, unchanged from the previous year. CMHC's survey targeted private and non-profit facilities where the majority of residents are over the age of 65 and have access to additional services not offered in traditional rental structures such as a meal plan, housekeeping, and laundry services.

The 2016 survey identified a total of 6,751 people living in seniors' residences in Saskatchewan out of an estimated 79,200 persons aged 75 years or older. This compares to 6,426 residents out of a population of 78,600 seniors in 2015. As a result, the capture rate[2] increased to 8.5 per cent in 2016 from 8.2 per cent in the previous year. Correspondingly, the total number of seniors' housing spaces, including standard and non-standard spaces, increased 6.5 per cent to 6,900 units in 2016 from 6,478 units a year earlier.

Between the province's two major centres, the vacancy rate for standard spaces was higher in Regina at 11.2 per cent, up from 6.8 per cent in 2015. In Saskatoon, the vacancy rate declined to 8.2 per cent in the 2016 survey from 9.6 per cent in the previous survey, as the number of standard spaces decreased between the two surveys. For the Rest of Saskatchewan, the vacancy rate for standard spaces was 12.7 per cent this year, down from 14.1 per cent in 2015.

Among different bedroom types, bachelor units continued to have the highest vacancy rate across the province in 2016 for standard spaces, at 11.2 per cent. Spaces with one bedroom reported the lowest vacancy rate at 9.2 per cent, compared to 7.3 per cent in 2015. In this bedroom category, Saskatoon had the lowest vacancy rate in 2016 at 6.5 per cent, down from 6.9 per cent one year prior. Meanwhile, the vacancy rate for standard spaces with two bedrooms or more in Saskatoon increased to 7.3 per cent this year from 1.7 per cent in 2015. The increase is magnified by the small size of the universe in this bedroom category, compared to the universe size of other bedroom types in the Saskatoon. In Regina, the lowest vacancy rate for standard spaces was reported in bachelor units at 9.8 per cent, up from 9.1 per cent in the previous year. The highest vacancy rate was in one-bedroom spaces at 12.3 per cent in 2016, up from 4.4 per cent in 2015. The addition of a new residence with a significantly high vacancy among one-bedroom units to Regina's survey universe this year helped push up the vacancy rate in 2016.

By rent range, standard spaces in Saskatoon with a monthly rent between $2,000 and $2,499 reported the highest vacancy rate this year at 12.9 per cent, while the lowest vacancy rate of 1.3 per cent was found in spaces with a monthly rent of less than $1,500 per month. By contrast, the highest vacancy rate in Regina of 10.7 per cent was for standard spaces with a monthly rent of $2,500 or more. Among the lowest vacancy rates were spaces charging a monthly rent between $2,000 and $2,499.

Vacancies for heavy care spaces move higher

In the 2016 survey, the vacancy rate for heavy care spaces in Saskatchewan was 11.5 per cent, compared to 8.9 per cent in 2015. Heavy care spaces are classified as spaces in seniors' residences that provide 1.5 hours or more of health care per day to its residents. Examples include care for residents with Alzheimer's, Dementia and mobility support residents. Typically, the additional health care services provided to residents of heavy care facilities increases the rent over standard spaces. Changes to the vacancy rate for heavy care spaces have to be interpreted cautiously due to the small size of the universe of spaces. In Saskatoon's case, the high vacancy rate in 2016 reflects the fact that the universe of heavy care spaces consisted of only four structures of which one had a large portion of vacant units, thus impacting the overall vacancy rate.

Rent

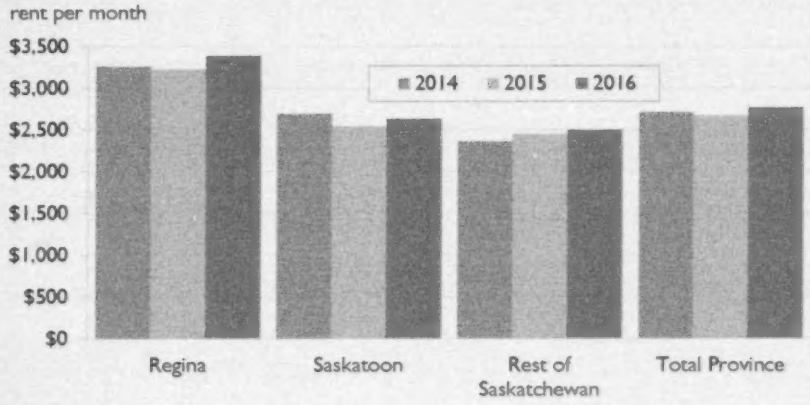
Average rent for standard spaces in Saskatchewan edges higher in 2016

The average monthly rent for a standard space in Saskatchewan was $2,768 in 2016 for all bedroom types, up from $2,667 in 2015. The additional amenities and services provided in seniors' residences typically push rents above those in the purpose-built rental market. As well, average rents in seniors'

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

Figure 2

Saskatchewan's Average Rent for Standard Spaces Modestly Increases



Source: CMHC

residences are impacted by the different meal plan and services choices made by residents and thus can vary from one year to the next. Across the province, all bedroom types reported an increase in the average monthly rent for a standard space. The largest rent increase, in dollar terms, was reported in suites with two bedrooms or more at $3,519 in 2016, up from $3,333 in the previous year.

Between Saskatchewan's two Census Metropolitan Areas (CMAs), the highest average monthly rent for two-bedroom and larger standard spaces in 2016 was reported in the Regina CMA at $4,170, up from $3,883 in 2015. Part of this increase is due to conversion of previously non-standard or heavy care spaces to standard spaces in the 2016 survey. In the Saskatoon CMA, the average rent for units with two bedrooms or more was $3,016 in 2016, up from $2,812 a year earlier. On a comparative basis, standard spaces in the Regina CMA have higher average monthly rents across bedroom types due to the centre's relatively smaller universe and higher percentage of units built in 2000 or later.

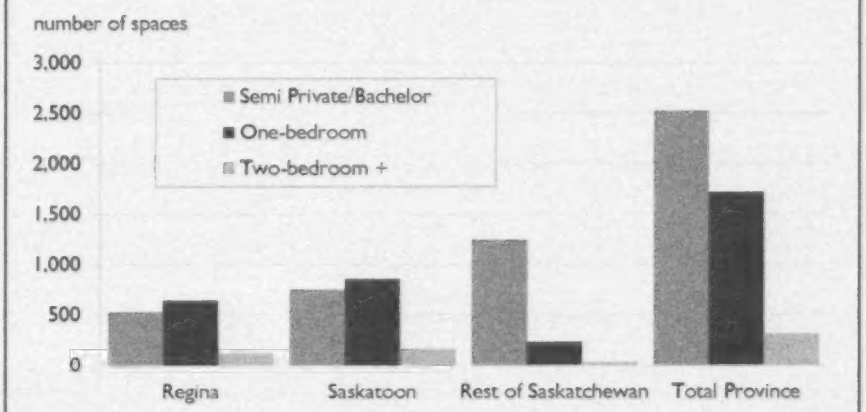
In the 2016 survey, the provincial distribution of standard spaces by rent range was concentrated more towards the higher rent ranges mainly due to relatively higher rents in the Regina CMA. Nearly 87 per cent of standard spaces in Regina had an average rent of $2,500 or more in 2016. By contrast, Saskatoon and the Rest of Saskatchewan had 59 per cent and 40 per cent of standard spaces with rents of $2,500 or more, respectively. For the entire province, just over six per cent of all standard spaces charged less than $1,500 per month in rent in 2016, while close to 60 per cent charged a monthly rent of $2,500 or more.

Average rent for heavy care spaces rises

The average monthly rent for a heavy care space in Saskatchewan was $4,464 in 2016, compared to $4,194 in 2015. Typically, rents charged in heavy care spaces are higher than the average monthly rent for standard spaces as the health care service a resident requires in heavy care adds to the cost of rent. For example, the average rent for a heavy care space in Regina was $4,615 per month in the 2016 survey, compared to the average monthly rent for a standard space at $3,388.

Figure 3

Saskatchewan - 2016 Universe of Total Standard Spaces



Source: CMHC

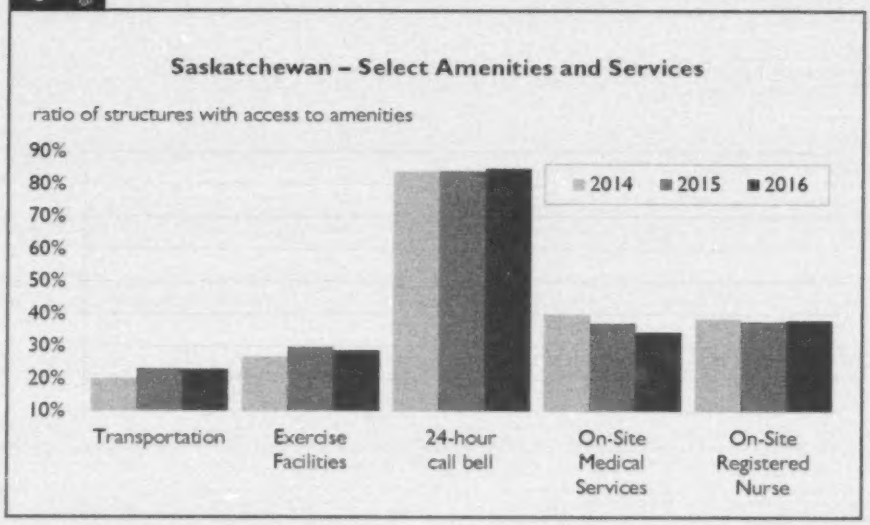
Universe

Universe of Retirement Spaces increases

In 2016, the total number of seniors' residences increased six per cent to 177 residences from 167 in the previous year. There were 525 new spaces in 13 residences opened in 2014 that were included in the survey for the first time this year. One other residence that opened before 2014 but was surveyed for the first time in 2016 added 13 more spaces. In total, the number of retirement spaces increased to 6,900 from 6,478 spaces in 2015. Of the 6,900 spaces in the survey, 66 per cent or 4,557 spaces were identified as standard spaces. About 22 per cent or 1,515 were non-standard spaces such as heavy care, non-market or rental subsidy spaces, and some being used to provide respite care. The remaining 12 per cent or 828 represented unknown spaces that could neither be identified as standard nor non-standard spaces in the current survey.

Across Saskatchewan, semi-private and bachelor spaces were the most common, numbering 2,525 spaces or 55.4 per cent of the standard universe in 2016. However, in both the Regina and Saskatoon CMAs, one bedroom spaces accounted for the majority of the standard universe. In the Rest of Saskatchewan, semi-private and bachelor units made up 82.6 per cent of standard spaces in the current survey.

Figure 4



Source: CMHC

Services and Amenities

CMHC's 2016 Seniors' Housing Survey targeted residences where the majority of residents are seniors that have access to additional services not offered in traditional rental structures, such as an on-site meal plan. Seniors' residents were offered a variety of different amenities depending on the residence.

As in previous years, the most common amenity in Saskatchewan reported in the current survey was 24-hour bell service, which was provided in nearly 85 per cent of all structures. The second most common amenity was on-site nursing services, which were available in nearly 38 per cent of seniors' residences. Other popular amenities accessible to residents included on-site medical services, internet, exercise facilities, and transportation services.

TABLES INCLUDED IN THE SASKATCHEWAN SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Regina CMA	**	**	9.1	9.8	4.4	12.3	7.9	11.6	6.8	11.2
Saskatoon CMA	**	**	14.5	9.7	6.9	6.5	1.7	7.3	9.6	8.2
Rest of Saskatchewan	**	**	14.7	12.5	12.1	11.6	7.1	**	14.1	12.7
Saskatchewan	**	**	**13.6**	**11.2**	**7.3**	**9.2**	**4.7**	**9.8**	**10.6**	**10.6**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Regina CMA	**	**	**	**	7.4	6.3	6.3	10.7	6.6	10.7
Saskatoon CMA	0.4	1.3	5.8	4.2	11.4	12.9	11.9	9.4	9.6	8.4
Rest of Saskatchewan	5.1	**	12.4	13.1	13.1	15.9	16.4	8.9	14.1	12.9
Saskatchewan	**1.1**	**5.9**	**9.5**	**11.0**	**12.0**	**13.9**	**11.2**	**9.8**	**10.5**	**10.6**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2015	2016	2015	2016
Regina CMA	0.0	0.8	4,273	4,615
Saskatoon CMA	**	65.5	**	**
Rest of Saskatchewan	7.1	8.3	3,262	**
Saskatchewan	**8.9**	**11.5**	**4,194**	**4,464**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2015	2016				
Regina CMA	1,513	5.8	9.6	39	1,459		
Saskatoon CMA	3,082	7.0	6.6	69	3,199		
Rest of Saskatchewan	2,305	12.7	12.5	69	2,093		
Saskatchewan	**6,900**	**8.7**	**9.2**	**177**	**6,751**	**79,200**	**8.5**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	716	676	121	1,513
Saskatoon CMA	1,098	1,662	322	3,082
Rest of Saskatchewan	1,669	525	111	2,305
Saskatchewan	**3,483**	**2,863**	**554**	**6,900**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	**716**	**676**	**121**	**1,513**
Standard Spaces	531	636	121	1,288
Non-Standard Spaces	185	40	-	225
Unknown Spaces	-	-	-	-
Saskatoon CMA	**1,098**	**1,662**	**322**	**3,082**
Standard Spaces	752	851	164	1,767
Non-Standard Spaces	166	649	138	953
Unknown Spaces	180	162	20	362
Rest of Saskatchewan	**1,669**	**525**	**111**	**2,305**
Standard Spaces	1,242	229	31	1,502
Non-Standard Spaces	315	20	2	337
Unknown Spaces	112	276	78	466
Saskatchewan	**3,483**	**2,863**	**554**	**6,900**
Standard Spaces	2,525	1,716	316	4,557
Non-Standard Spaces	666	709	140	1,515
Unknown Spaces	292	438	98	828

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2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Regina CMA	**	1.3	10.0	88.7
Saskatoon CMA	13.3	10.9	16.5	59.3
Rest of Saskatchewan	2.7	20.9	36.5	39.9
Saskatchewan	**6.2**	**12.2**	**22.2**	**59.5**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Regina CMA	2.6	0.0	10.3	87.2	43.6	51.3	92.3	0.0
10 - 49	3.3	0.0	0.0	96.7	40.0	53.3	90.0	0.0
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	0.0	57.1	42.9	42.9	28.6	100.0	0.0
Saskatoon CMA	15.2	9.1	3.0	72.7	31.8	34.8	78.8	0.0
10 - 49	2.2	4.3	0.0	93.5	34.8	41.3	87.0	0.0
50 - 89	**	**	**	**	**	**	88.9	**
90 or more	**	**	**	**	**	**	**	**
Rest of Saskatchewan	**	0.0	4.9	93.4	**	**	86.5	0.0
10 - 49	**	0.0	6.0	91.9	26.5	26.7	85.6	0.0
50 - 89	**	**	**	100.0	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	**7.1**	**3.5**	**5.3**	**84.0**	**34.3**	**38.0**	**84.8**	**0.0**
10 - 49	2.4	1.6	2.5	93.5	32.5	37.9	87.1	0.0
50 - 89	14.4	9.6	0.0	75.9	**	**	89.5	0.0
90 or more	29.9	10.0	29.1	**	**	25.4	65.1	0.0

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	**28.2**	**7.7**	**20.5**	**23.1**	**35.9**	**43.6**
10 - 49	10.0	0.0	6.7	6.7	16.7	30.0
50 - 89	**	**	**	**	**	**
90 or more	100.0	28.6	71.4	85.7	100.0	100.0
Saskatoon CMA	**18.2**	**4.5**	**7.6**	**7.6**	**28.8**	**25.8**
10 - 49	10.9	0.0	0.0	0.0	10.9	15.2
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	81.8	**
Rest of Saskatchewan	**24.6**	**0.0**	**10.2**	**3.6**	**24.2**	**
10 - 49	**	0.0	**	**	15.5	27.6
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
Saskatchewan	**22.9**	**3.5**	**11.5**	**9.4**	**28.6**	**32.9**
10 - 49	13.6	0.0	4.1	2.4	14.1	23.7
50 - 89	**	9.4	**	9.4	**	**
90 or more	59.2	19.5	**	54.4	84.2	69.2

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Regina CMA	**	**	3,091	3,098	3,179	3,468	3,883	4,170	3,223	3,388
Saskatoon CMA	**	**	2,582	2,658	2,461	2,541	2,812	3,016	2,544	2,628
Rest of Saskatchewan	1,686	**	2,273	2,413	2,870	2,776	3,813	**	2,447	2,494
Saskatchewan	**1,699**	**1,867**	**2,521**	**2,605**	**2,743**	**2,889**	**3,333**	**3,519**	**2,667**	**2,768**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Saskatchewan

Centre	Concrete Frame	Wood Frame
Saskatchewan	**24.1**	**75.9**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Saskatchewan

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Regina CMA	Cable	28.2	66.7	5.1	**
	Telephone	**	97.4	2.6	**
Saskatoon CMA	Cable	27.5	63.8	2.9	**
	Telephone	2.9	89.9	**	**
Rest of Saskatchewan	Cable	18.8	59.4	17.4	44.00
	Telephone	4.3	87.0	1.4	**
Saskatchewan	**Cable**	**24.3**	**62.7**	**9.0**	**43.33**
	Telephone	**2.8**	**90.4**	**1.1**	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	13.2	10.5	11.2
Saskatoon CMA	2.5	10.7	9.4	8.2
Rest of Saskatchewan	17.4	18.0	11.2	12.7
Saskatchewan	**7.2**	**13.7**	**10.4**	**10.6**

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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	Semi Private	**	**	**	**
	Bachelor	**	2,786	3,320	3,098
	One Bedroom	**	**	3,500	3,468
	Two Bedroom +	**	**	4,171	4,170
	All	**	3,087	3,508	3,388
Saskatoon CMA	Semi Private	**	**	**	**
	Bachelor	2,112	2,307	2,868	2,658
	One Bedroom	1,076	**	3,158	2,541
	Two Bedroom +	**	**	3,603	3,016
	All	1,449	2,325	3,067	2,628
Rest of Saskatchewan	Semi Private	**	**	**	**
	Bachelor	2,284	2,147	2,474	2,413
	One Bedroom	**	**	2,926	2,776
	Two Bedroom +	**	**	**	**
	All	2,166	2,173	2,586	2,494
Saskatchewan	**Semi Private**	**	**	**	**1,867**
	Bachelor	**2,220**	**2,435**	**2,706**	**2,605**
	One Bedroom	**1,140**	**2,722**	**3,248**	**2,889**
	Two Bedroom +	**	**	**3,862**	**3,519**
	All	**1,695**	**2,592**	**2,987**	**2,768**

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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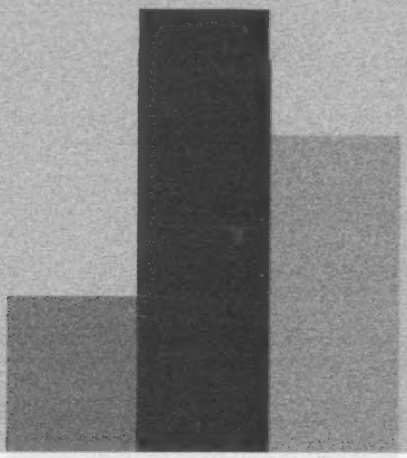

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